



# TransactIQ Team Iteration One

# Meet the Team

---

- Chandler Clevenger
- Robert Duncan
- Jake Freestone
- Jay Ling
- Robert Mooney

Client Company



# Mentor Feedback

---

- Would like to see better error handling
- Need to use SRP for one of the files for it has more than one class
- Better styling and gave us resources
- Gave us mapping libraries to use for back-end



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# Client Feedback

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- Really liked it
  - Visually looked good
  - Favored the sorting functionality
  - Surpassed expectations for Iteration One
- One of our usual clients wasn't there

# Iteration One Features



TransactIQ

 John Doe

Enter File Below:



| Transaction Code<br>↓   | Transaction Description<br>↓    | IRA Code<br>↓ | Has Asset<br>↓ | Has TaxLot<br>↓ | Has Price<br>↓ | Has Payee<br>↓ | Principle Cash<br>↓ | Income Cash<br>↓ | Principle Invest<br>↓ | Income Invest<br>↓ | Principle Inventory<br>↓ | Income Inventory<br>↓ | Units<br>↓ |
|-------------------------|---------------------------------|---------------|----------------|-----------------|----------------|----------------|---------------------|------------------|-----------------------|--------------------|--------------------------|-----------------------|------------|
| 506-000                 | IRA CASH TRANSFER DEPOSIT       | null          | No             | No              | No             | No             | +                   | 0                | 0                     | 0                  | 0                        | 0                     | 0          |
| 439-400                 | SELF DIRECTED IRA FEE (INVOICE) | null          | No             | No              | No             | No             | +                   | 0                | 0                     | 0                  | 0                        | 0                     | 0          |
| 201-000                 | CASH DEPOSIT                    | null          | No             | No              | No             | No             | +                   | 0                | 0                     | 0                  | 0                        | 0                     | 0          |
| 641-000                 | LOAN PAYMENT - INTEREST         | null          | No             | No              | No             | No             | +                   | 0                | 0                     | 0                  | 0                        | 0                     | 0          |
| 111-315                 | WIRE FEE                        | 0             | No             | No              | No             | No             | 0                   | 0                | 0                     | 0                  | 0                        | 0                     | 0          |
| Total Transactions: 250 |                                 |               |                |                 |                |                |                     |                  |                       |                    |                          |                       |            |
| Unique Transactions: 31 |                                 |               |                |                 |                |                |                     |                  |                       |                    |                          |                       |            |

## Functional Requirement 1

The system shall take in a file or user input.

**Priority level: HIGH**

# Iteration One Features



TransactIQ

 John Doe

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| Transaction Code ↓ | Transaction Description ↓       | IRA Code ↓ | Has Asset ↓ | Has TaxLot ↓ | Has Price ↓ | Has Payee ↓ | Principle Cash ↓ | Income Cash ↓ | Principle Invest ↓ | Income Invest ↓ | Principle Inventory ↓ | Income Inventory ↓ | Units ↓ |
|--------------------|---------------------------------|------------|-------------|--------------|-------------|-------------|------------------|---------------|--------------------|-----------------|-----------------------|--------------------|---------|
| 506-000            | IRA CASH TRANSFER DEPOSIT       | null       | No          | No           | No          | No          | +                | 0             | 0                  | 0               | 0                     | 0                  | 0       |
| 439-400            | SELF DIRECTED IRA FEE (INVOICE) | null       | No          | No           | No          | No          | +                | 0             | 0                  | 0               | 0                     | 0                  | 0       |
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| 641-000            | LOAN PAYMENT - INTEREST         | null       | No          | No           | No          | No          | +                | 0             | 0                  | 0               | 0                     | 0                  | 0       |

Total Transactions: 250

Unique Transactions: 31

## Functional Requirement 2

The system shall display the characteristics it finds within the data.

**Priority level: HIGH**

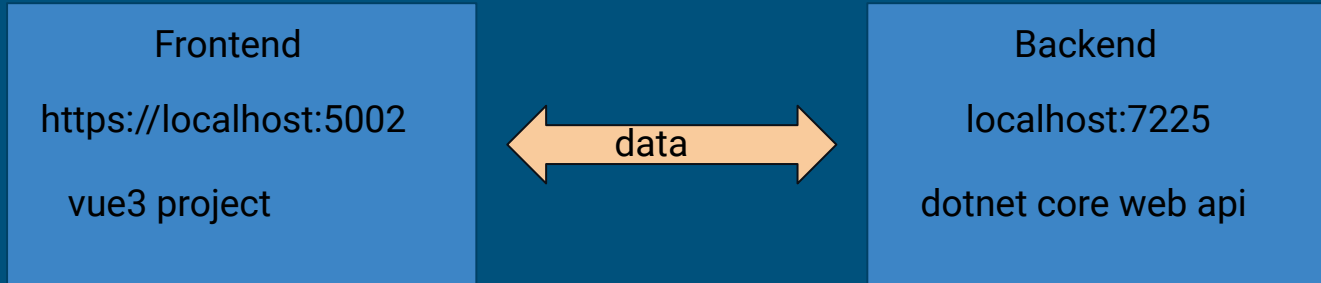
# Iteration One Features

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## Functional Requirement 3

**Priority level: MEDIUM**

The system shall be a web application.



# Iteration One Features



TransactIQ

 John Doe

Enter File Below:

| Transaction Code<br>↓   | Transaction Description<br>↓    | IRA Code<br>↓ | Has Asset<br>↓ | Has TaxLot<br>↓ | Has Price<br>↓ | Has Payee<br>↓ | Principle Cash<br>↓ | Income Cash<br>↓ | Principle Invest<br>↓ | Income Invest<br>↓ | Principle Inventory<br>↓ | Income Inventory<br>↓ | Units<br>↓ |
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| 641-000                 | LOAN PAYMENT - INTEREST         | null          | No             | No              | No             | No             | +                   | 0                | 0                     | 0                  | 0                        | 0                     | 0          |
| 111-315                 | WIRE FEE                        | 0             | No             | No              | No             | No             | 0                   | 0                | 0                     | 0                  | 0                        | 0                     | 0          |
| Total Transactions: 250 |                                 |               |                |                 |                |                |                     |                  |                       |                    |                          |                       |            |
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## Non-functional Requirement 1

The system shall have a distinct look in the UI.

**Priority level: LOW**

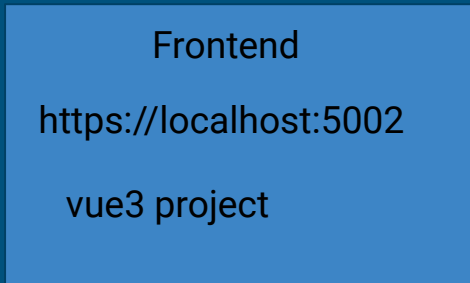
# Iteration One Features

Non-functional Requirement 2

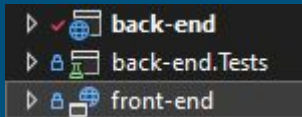
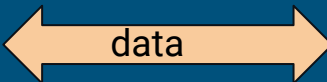
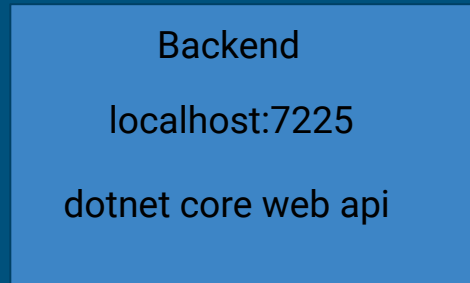
**Priority level: MEDIUM**

The UI and Logic must be separate.

Deploys with: `npm run serve`



Deploys with: `dotnet --project ./back-end/`



# Planned Iteration Two Features

---

- Docker Integration
- Database connection
- Login Page
- User creation, management, and authentication
- Basic data analysis

Hey, are  
you sleeping?



Yes, now  
shut up



I know how to fix  
that bug on line 255





# Demonstration

# Client Feedback

---

- Really liked it
  - Visually looked good
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# Iteration One Features



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Choose File



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## Functional Requirement 2

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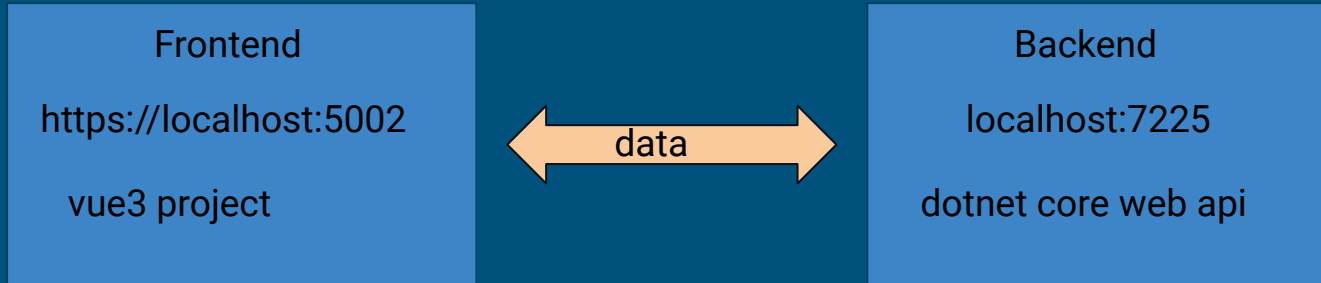
# Iteration One Features

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**Priority level: MEDIUM**

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# Iteration One Features



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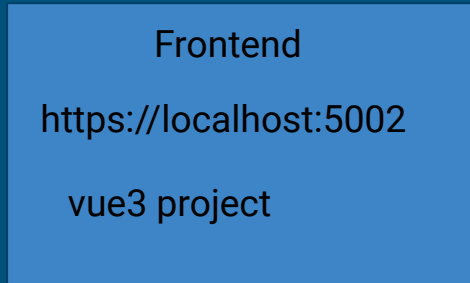
# Iteration One Features

Non-functional Requirement 2

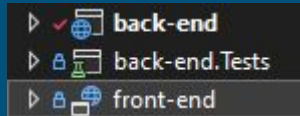
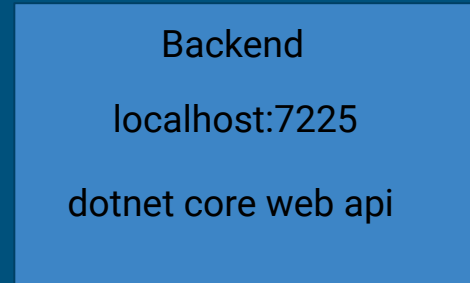
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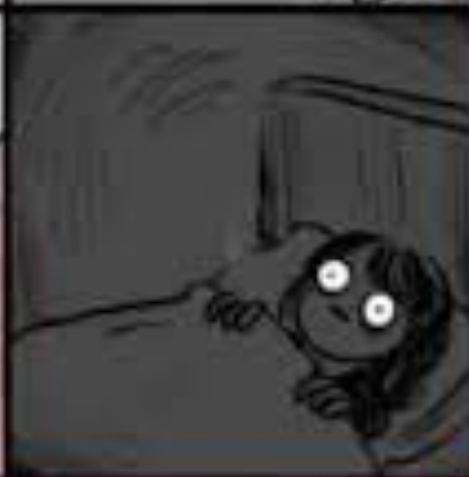
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I know how to fix  
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